

Billing and claims submission

This workflow automatically generates, validates, and submits insurance claims after treatment completion, then tracks claim status and handles rejections. It reduces manual billing errors and accelerates payment collection for dental practices.

Download PDF

Get Your Blueprint

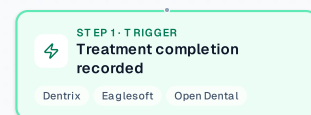


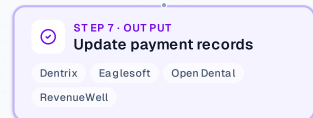
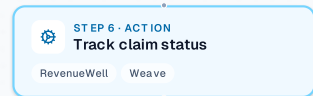
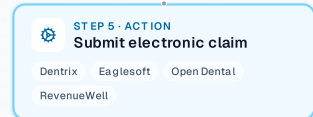
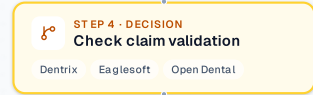
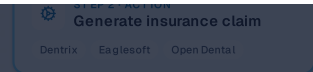
WORKFLOW TRIGGER

Treatment is marked as completed in practice management system

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Treatment completion recorded

Patient treatment is marked as completed in the practice management system. This automatically initiates the billing and claims submission process.

2

 ACTION

Generate insurance claim

System automatically creates an insurance claim using treatment codes, patient information, and insurance details. Claim is populated with appropriate CDT codes and fee schedules.

Dentrix

Eaglesoft

Open Dental

3

 ACTION

Verify insurance eligibility

Real-time verification of patient's current insurance coverage and benefits to ensure claim accuracy. Checks for coverage limits, deductibles, and pre-authorization requirements.

Dentrix

RevenueWell

4

 DECISION

Check claim validation

Automated validation checks claim for completeness, correct coding, and potential rejections. Routes to manual review if errors are detected, otherwise proceeds to submission.

Dentrix

Eaglesoft

Open Dental

5

 ACTION

Submit electronic claim

AI Business OS

Electronically submits validated claim to insurance carrier via clearinghouse. Generates claim tracking number and submission confirmation.

Dentrix

Eaglesoft

Open Dental

RevenueWell

6

 ACTION

Track claim status

Monitors claim processing status and automatically follows up on delayed payments. Sets reminders for claim follow-up based on typical processing timeframes.

RevenueWell

Weave

7

 OUTPUT

Update payment records

Posts insurance payments to patient accounts and generates patient statements for remaining balances. Creates aging reports for outstanding claims requiring attention.

Dentrix

Eaglesoft

Open Dental

RevenueWell



Outputs

- Electronic insurance claim submitted

- Payment posting and patient statement

AI Business OS

- Claims tracking and follow-up schedule



Key Metrics

- Claim acceptance rate
- Days to payment collection
- Claims processing accuracy



Tools & Integrations

- Dentrix
- Eaglesoft
- Open Dental
- RevenueWell
- Weave

AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

COMPANY

[About](#)

[Industries](#)

CONNECT

[MVP.dev](#)

[LinkedIn](#)

RESOURCES

[Articles](#)